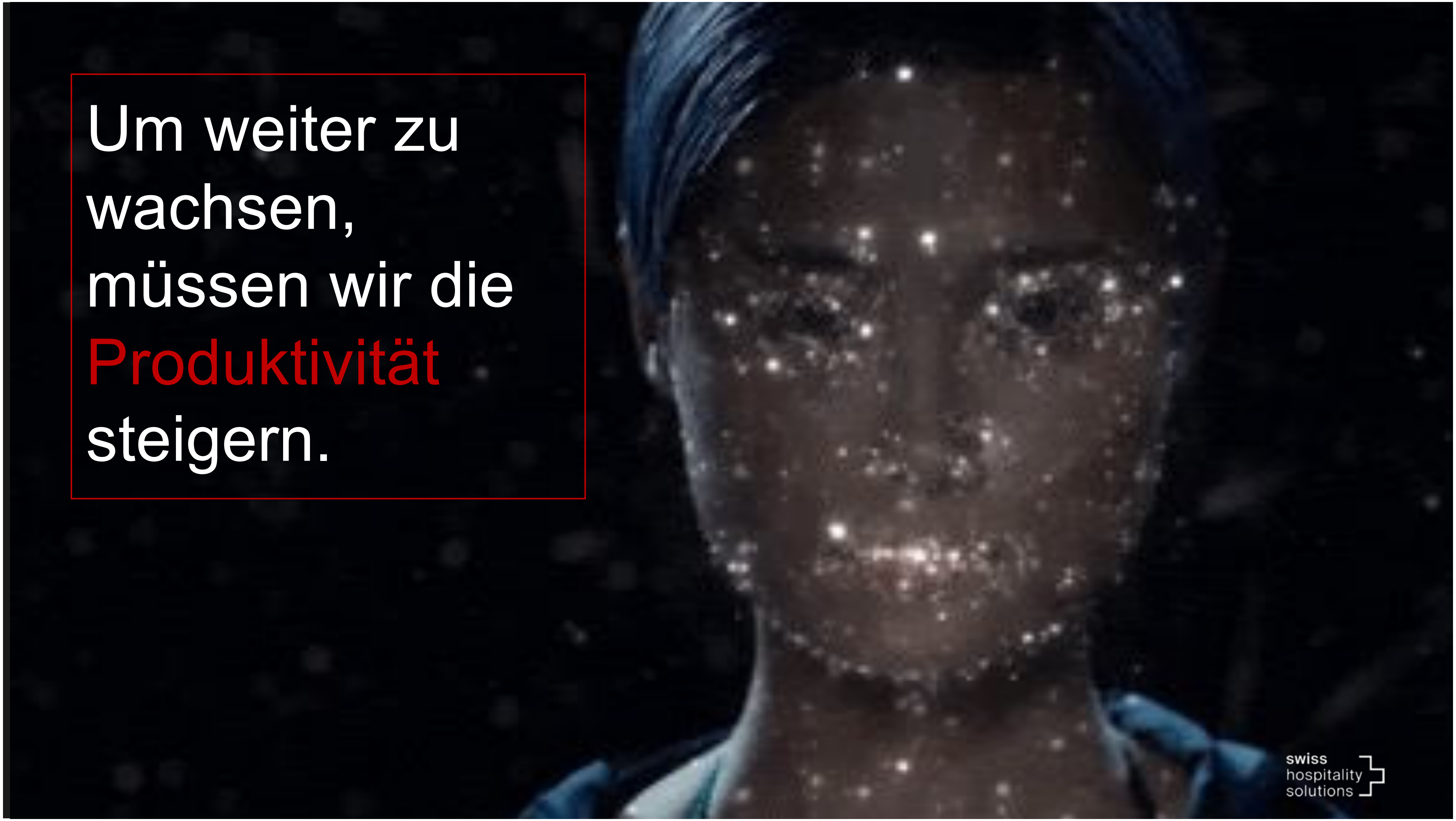
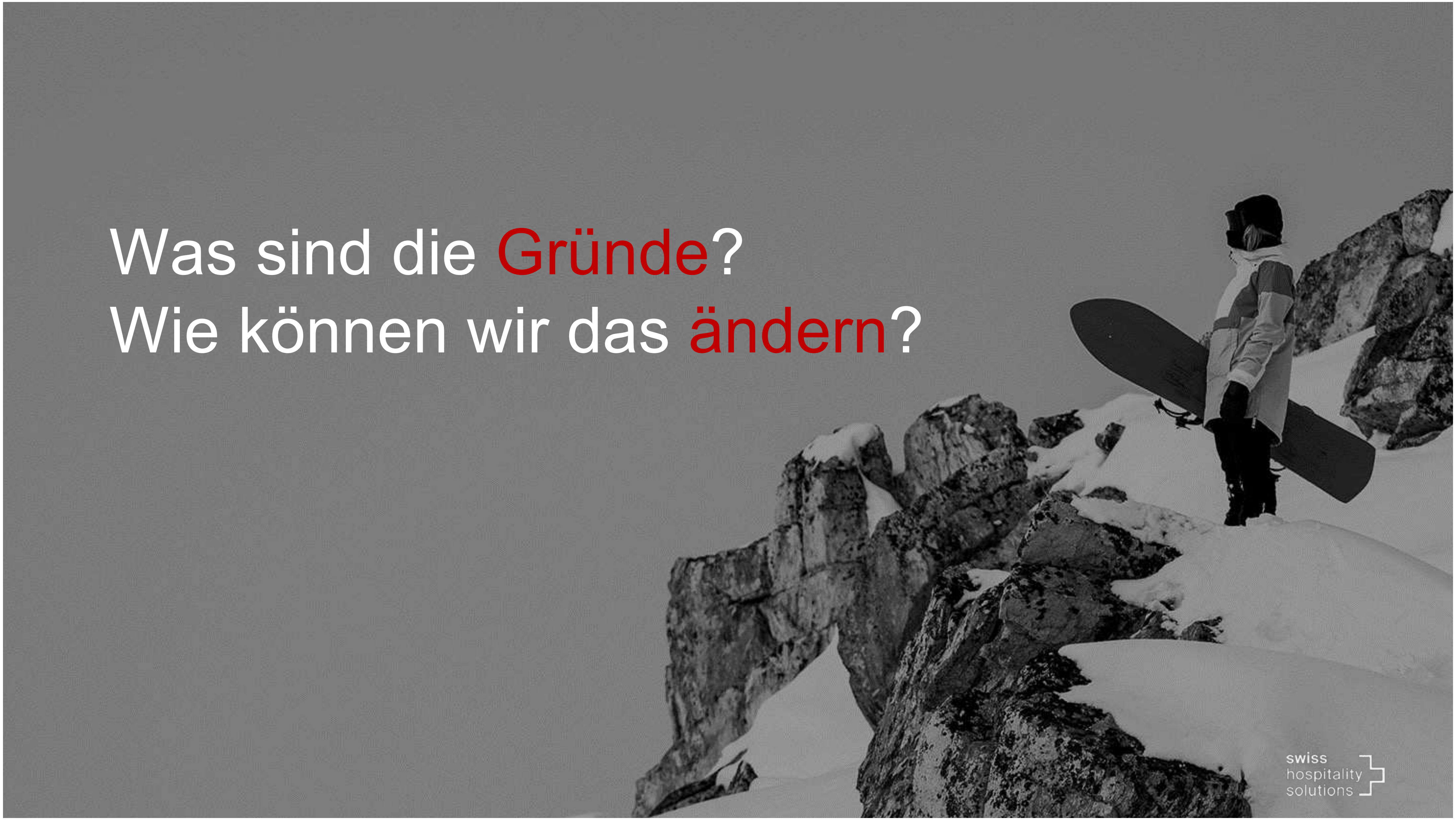


Um weiter zu wachsen, müssen wir die Produktivität steigern.

swiss
hospitality
solutions

Das ist aber schwierig, weil diese sinkt!



Was sind die Gründe?
Wie können wir das ändern?

McKinsey Global Institute

Dependency and depopulation? Confronting the consequences of a new demographic reality

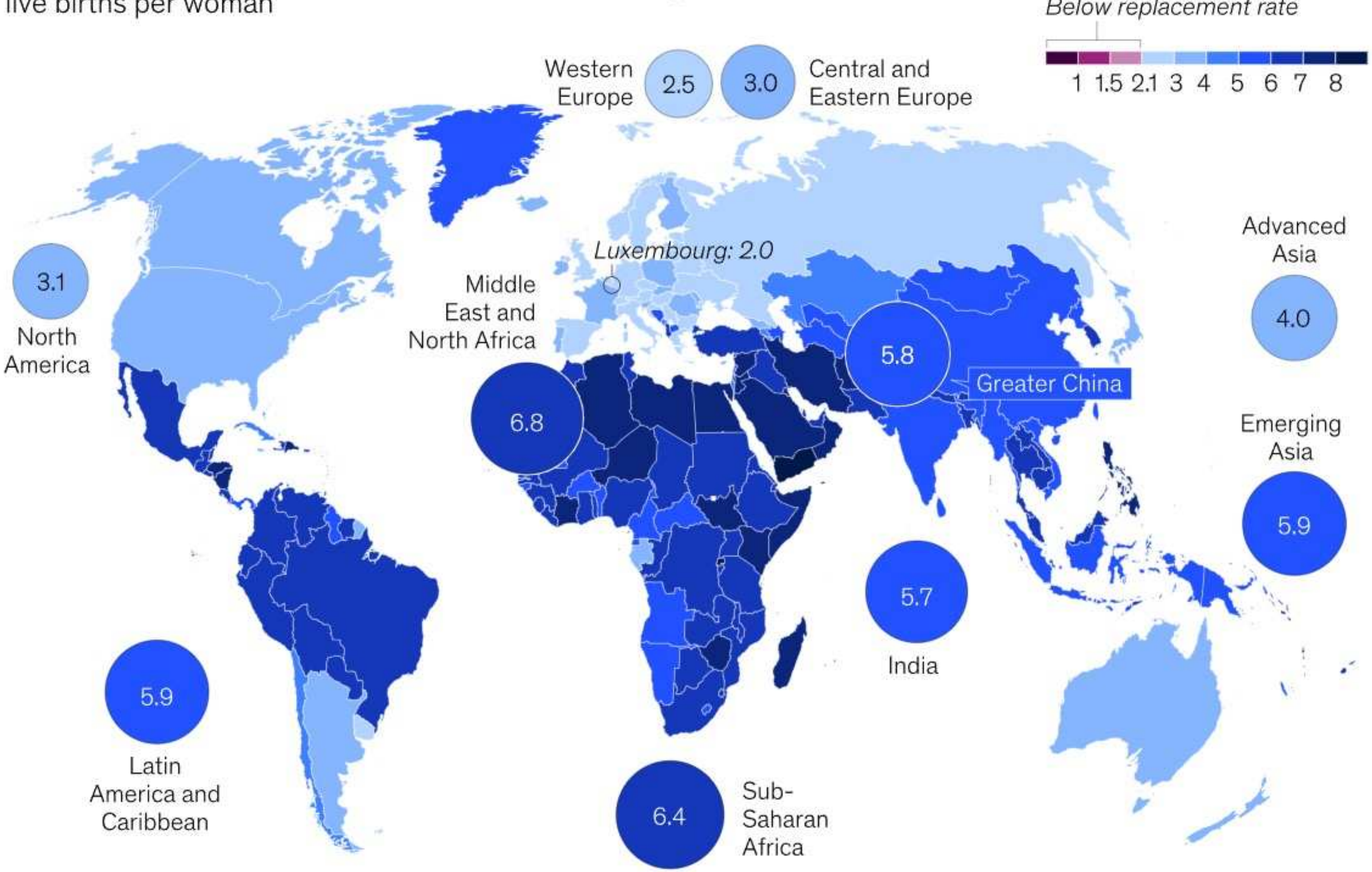
January 15, 2025 | Report

Demographisch

swiss
hospitality
solutions

Total fertility rate by country,
live births per woman

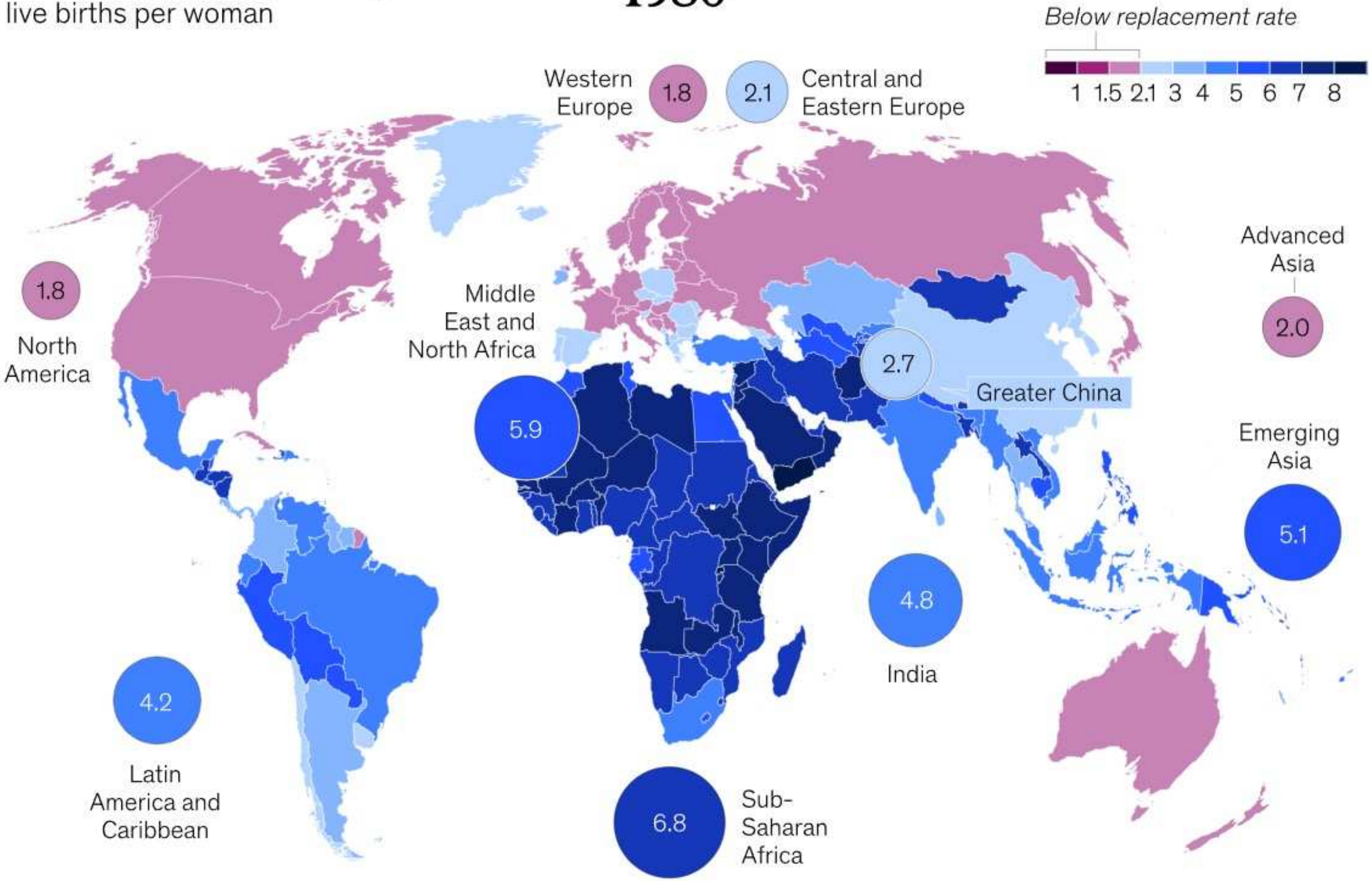
1950


Below replacement rate
1
1.5
2.1
3
4
5
6
7
8
Western Europe
2.5
3.0
Central and Eastern Europe
Luxembourg: 2.0
3.1
North America
Middle East and North Africa
6.8
5.8
Greater China
Advanced Asia
4.0
Emerging Asia
5.9
5.7
India
5.9
Latin America and Caribbean
6.4
Sub-Saharan Africa

Note: The boundaries and names shown on this map do not imply official endorsement or acceptance by McKinsey & Company.
Source: *World Population Prospects 2024*, United Nations; McKinsey Global Institute analysis

Total fertility rate by country,
live births per woman

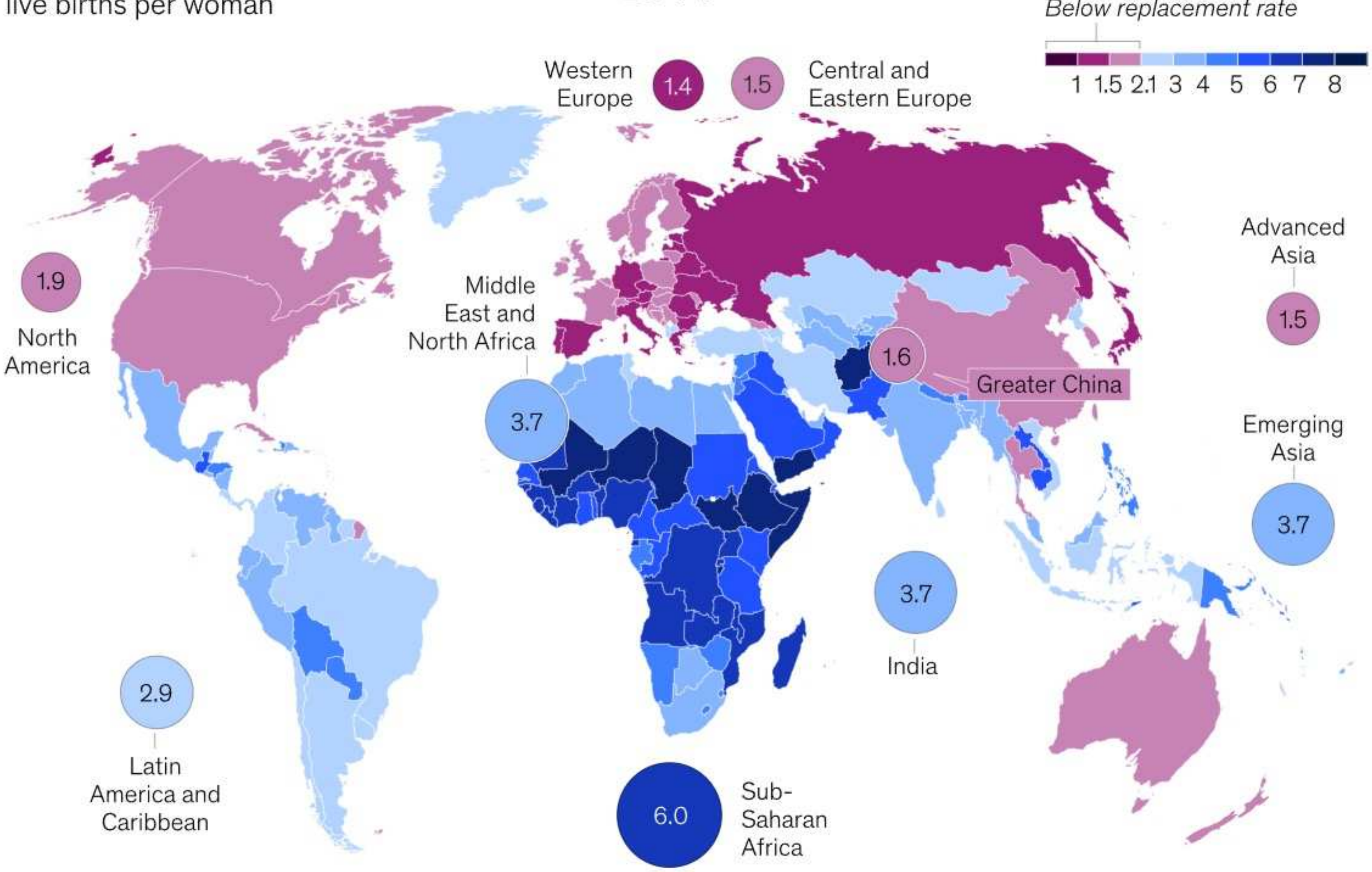
1980


Below replacement rate
1
1.5
2.1
3
4
5
6
7
8
Western Europe
1.8
2.1
Central and Eastern Europe
1.8
North America
Middle East and North Africa
5.9
2.7
Greater China
Advanced Asia
2.0
Emerging Asia
5.1
4.8
India
4.2
Latin America and Caribbean
6.8
Sub-Saharan Africa

Note: The boundaries and names shown on this map do not imply official endorsement or acceptance by McKinsey & Company.
Source: *World Population Prospects 2024*, United Nations; McKinsey Global Institute analysis

Total fertility rate by country,
live births per woman

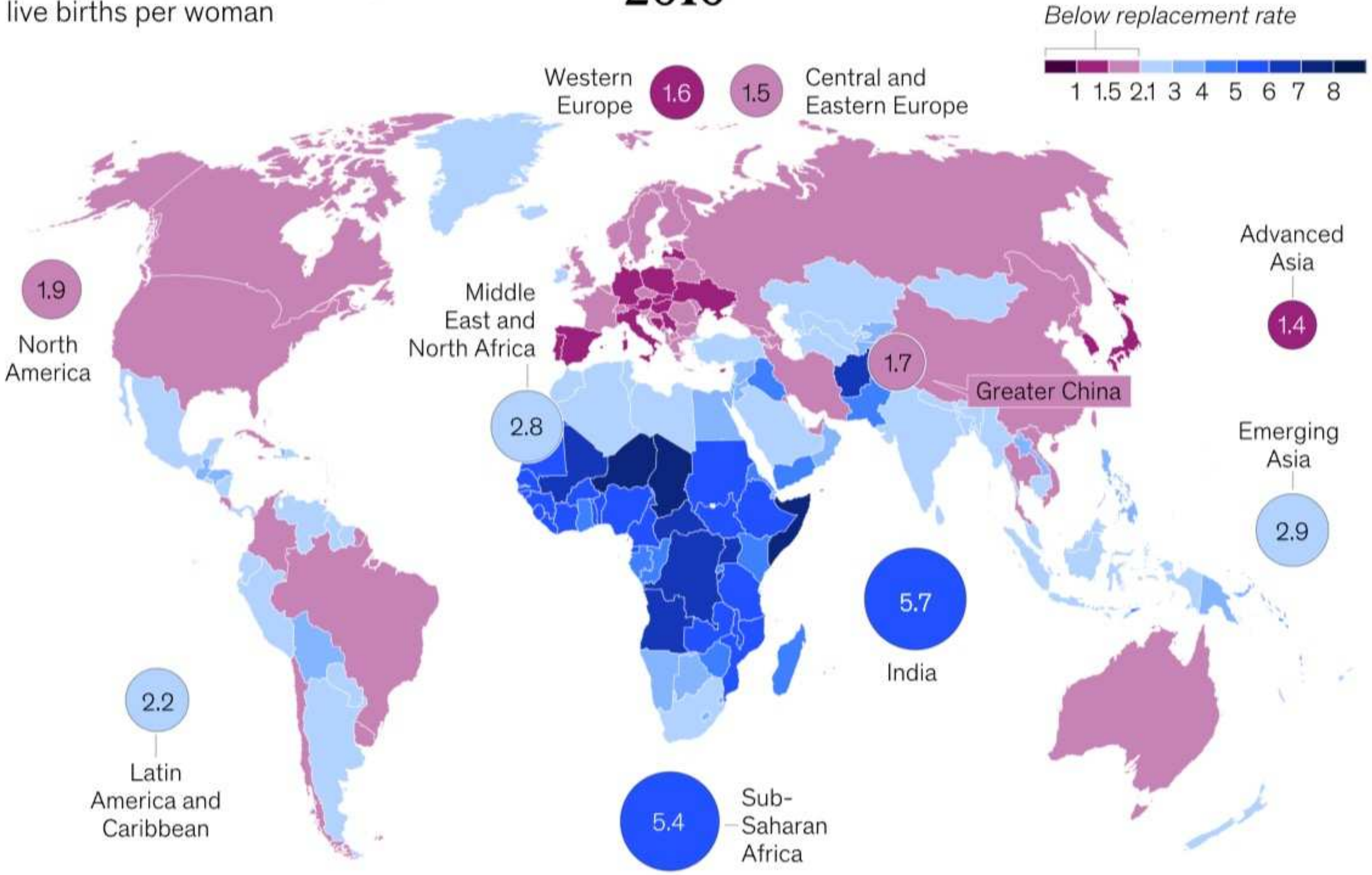
1995


Below replacement rate
1
1.5
2.1
3
4
5
6
7
8
Western Europe
1.4
1.5
Central and Eastern Europe
1.9
North America
Middle East and North Africa
3.7
1.6
Greater China
Advanced Asia
1.5
Emerging Asia
3.7
3.7
India
2.9
Latin America and Caribbean
6.0
Sub-Saharan Africa

Note: The boundaries and names shown on this map do not imply official endorsement or acceptance by McKinsey & Company.
Source: *World Population Prospects 2024*, United Nations; McKinsey Global Institute analysis

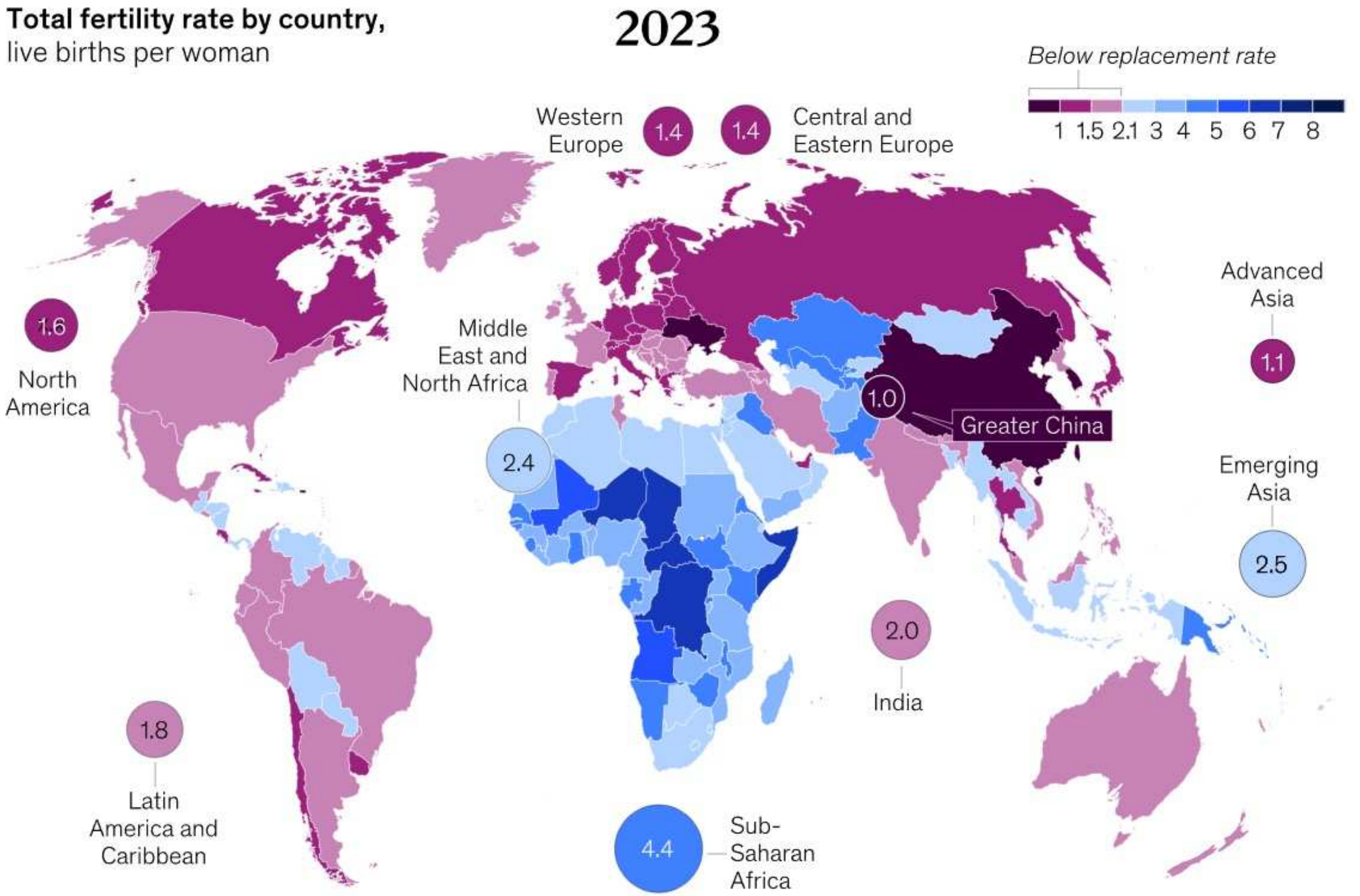
Total fertility rate by country,
live births per woman

2010


Below replacement rate
1
1.5
2.1
3
4
5
6
7
8
Western Europe
1.6
1.5
Central and Eastern Europe
1.9
North America
Middle East and North Africa
2.8
1.7
Greater China
Advanced Asia
1.4
Emerging Asia
2.9
5.7
India
2.2
Latin America and Caribbean
5.4
Sub-Saharan Africa

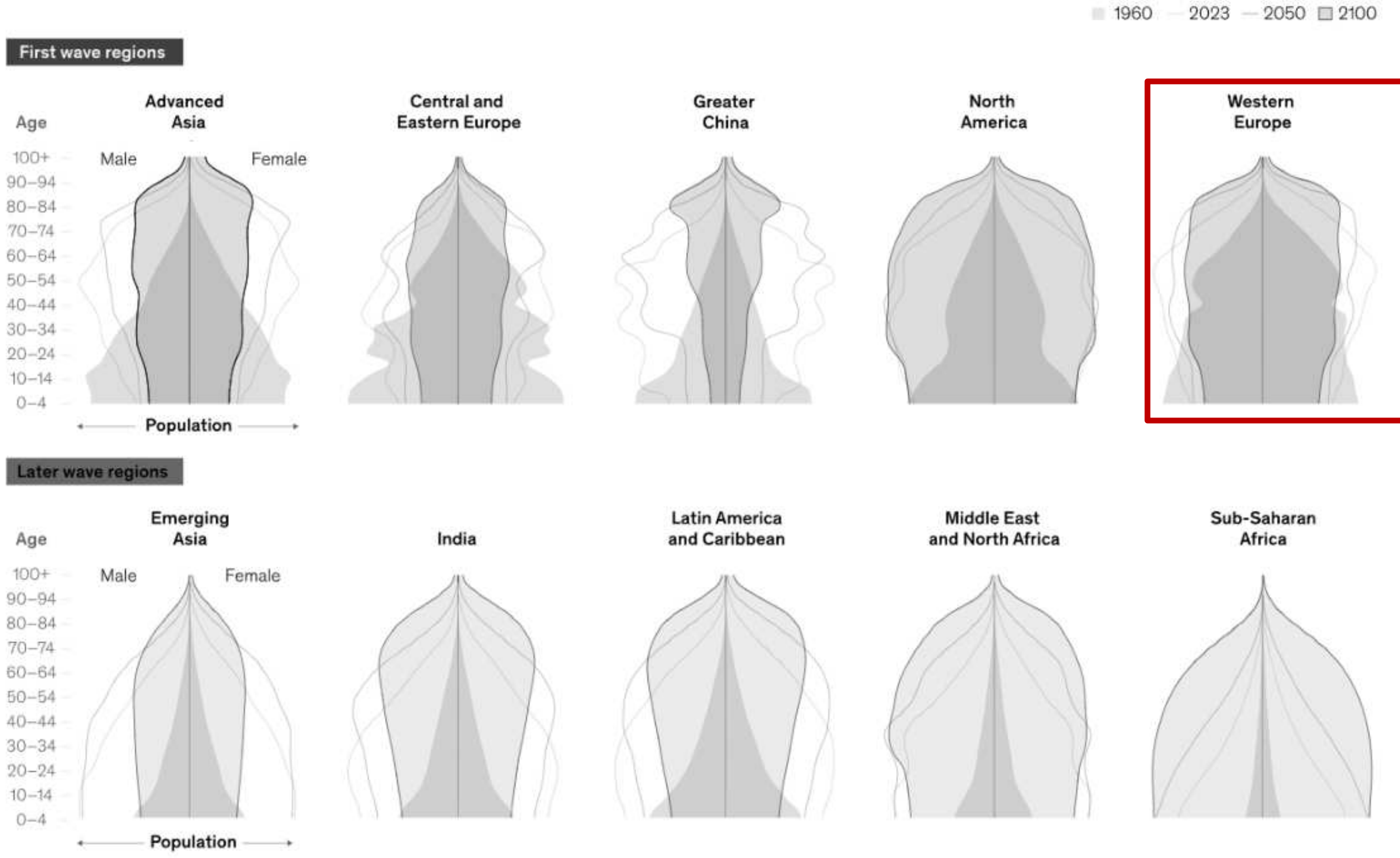
Note: The boundaries and names shown on this map do not imply official endorsement or acceptance by McKinsey & Company.
Source: *World Population Prospects 2024,* United Nations; McKinsey Global Institute analysis

Total fertility rate by country,
live births per woman


2023
Below replacement rate
1
1.5
2.1
3
4
5
6
7
8
Western Europe
1.4
1.4
Central and Eastern Europe
1.6
North America
Middle East and North Africa
2.4
1.0
Greater China
Advanced Asia
1.1
Emerging Asia
2.5
2.0
India
1.8
Latin America and Caribbean
4.4
Sub-Saharan Africa

Note: The boundaries and names shown on this map do not imply official endorsement or acceptance by McKinsey & Company.
Source: *World Population Prospects 2024*, United Nations; McKinsey Global Institute analysis

From «Pyramid» to «Obelisk»
Population breakdown by gender and age group 1960 – 2100



2050 werden in der CH
2 Personen mit Arbeit
1 Rentner versorgen

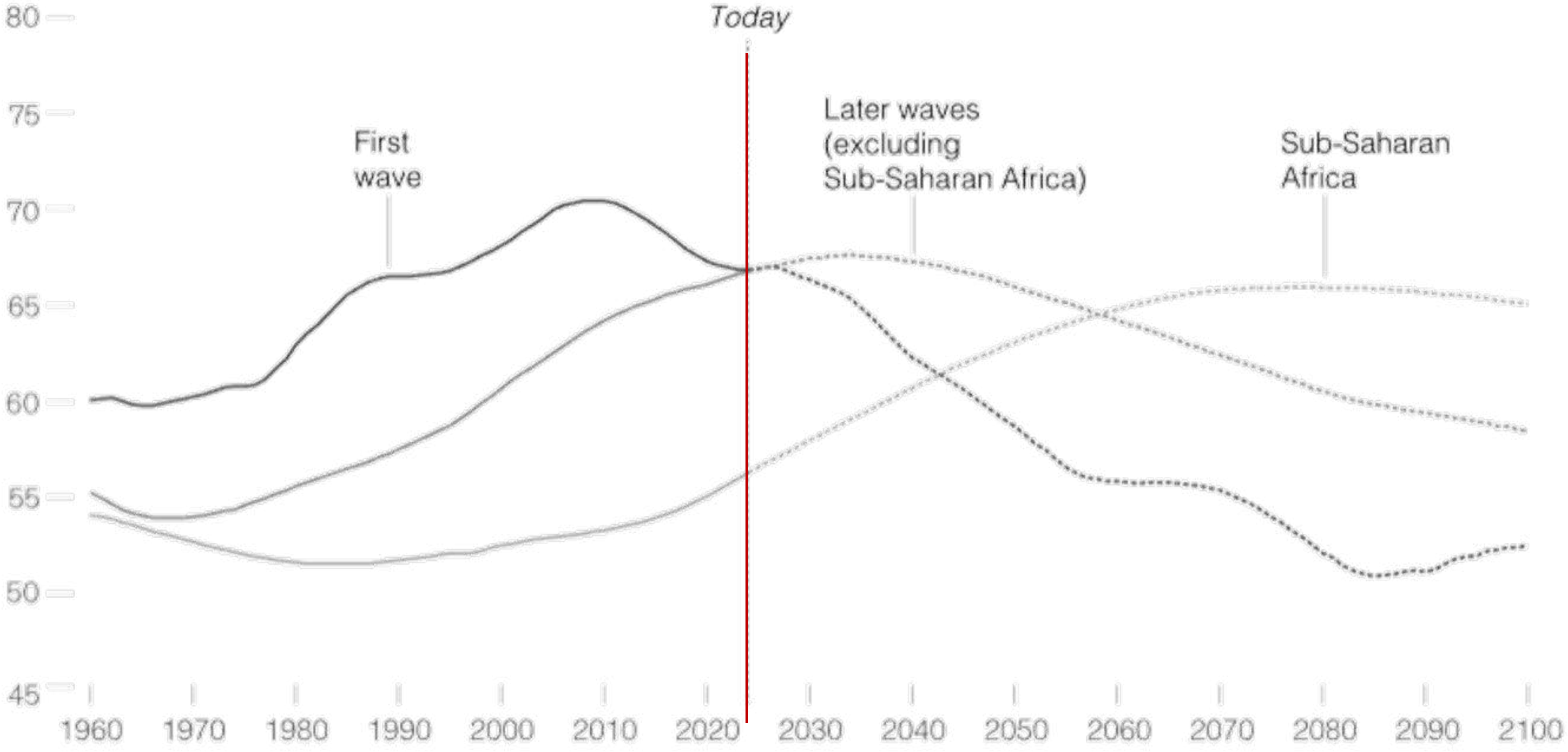
Bereits ab 2030 werden
Rentner bei Wahlen die
25% der Stimmen stellen

Source BFS 2024

Note: Pyramids are drawn to scale within each region but not between regions.
Source: *World Population Prospects 2024*, United Nations; McKinsey Global Institute analysis

Working-age population peak in three waves

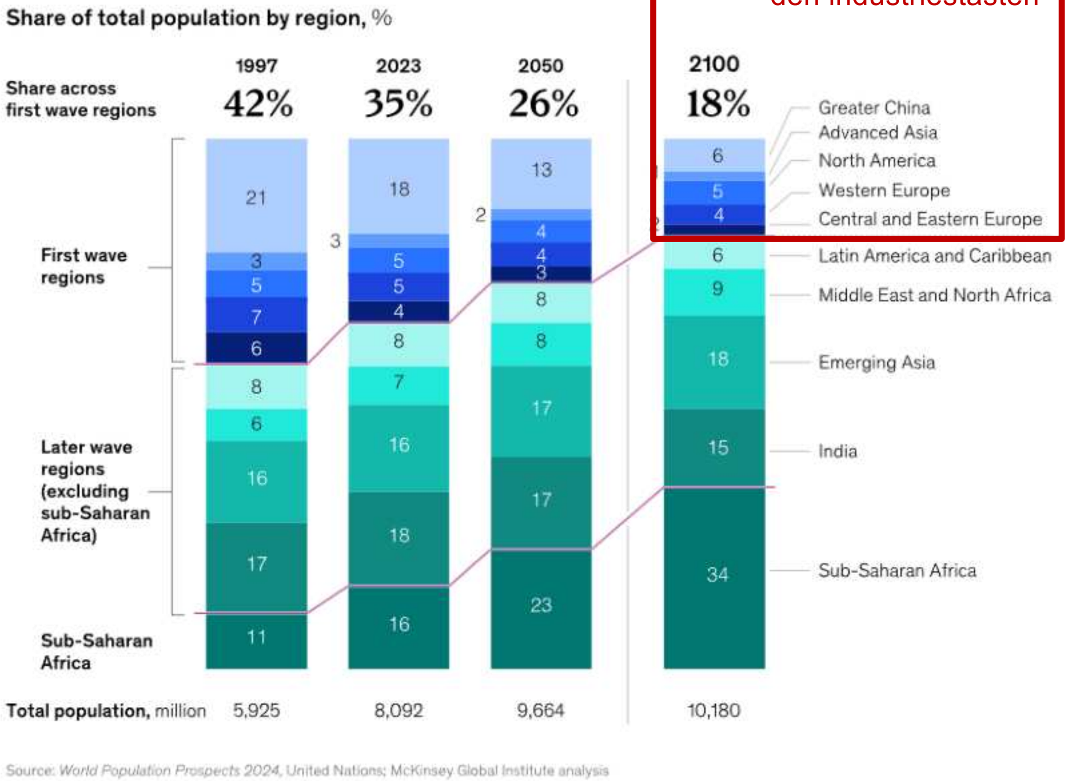
Population aged 15-64years in % of total population



Source: *World Population Prospects 2024*, United Nations; McKinsey Global Institute analysis

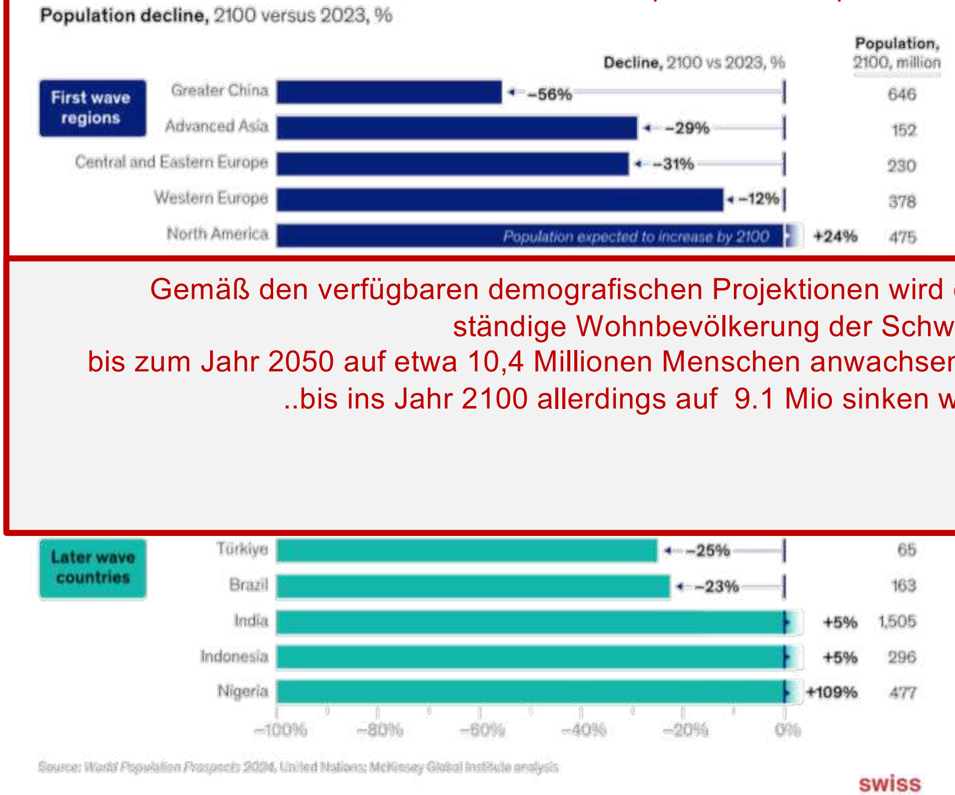
Fertility Ratio shifts global population

Weniger als 20% leben in den industriestasten



Source: *World Population Prospects 2024*, United Nations; McKinsey Global Institute analysis

Die meisten Industriestaaten werden bis zum Ende des Jahrhunderst einen «Population Collaps» erleben



Gemäß den verfügbaren demografischen Projektionen wird die ständige Wohnbevölkerung der Schweiz
bis zum Jahr 2050 auf etwa 10,4 Millionen Menschen anwachsen…
..bis ins Jahr 2100 allerdings auf 9.1 Mio sinken wird

Source: *World Population Prospects 2024*, United Nations; McKinsey Global Institute analysis

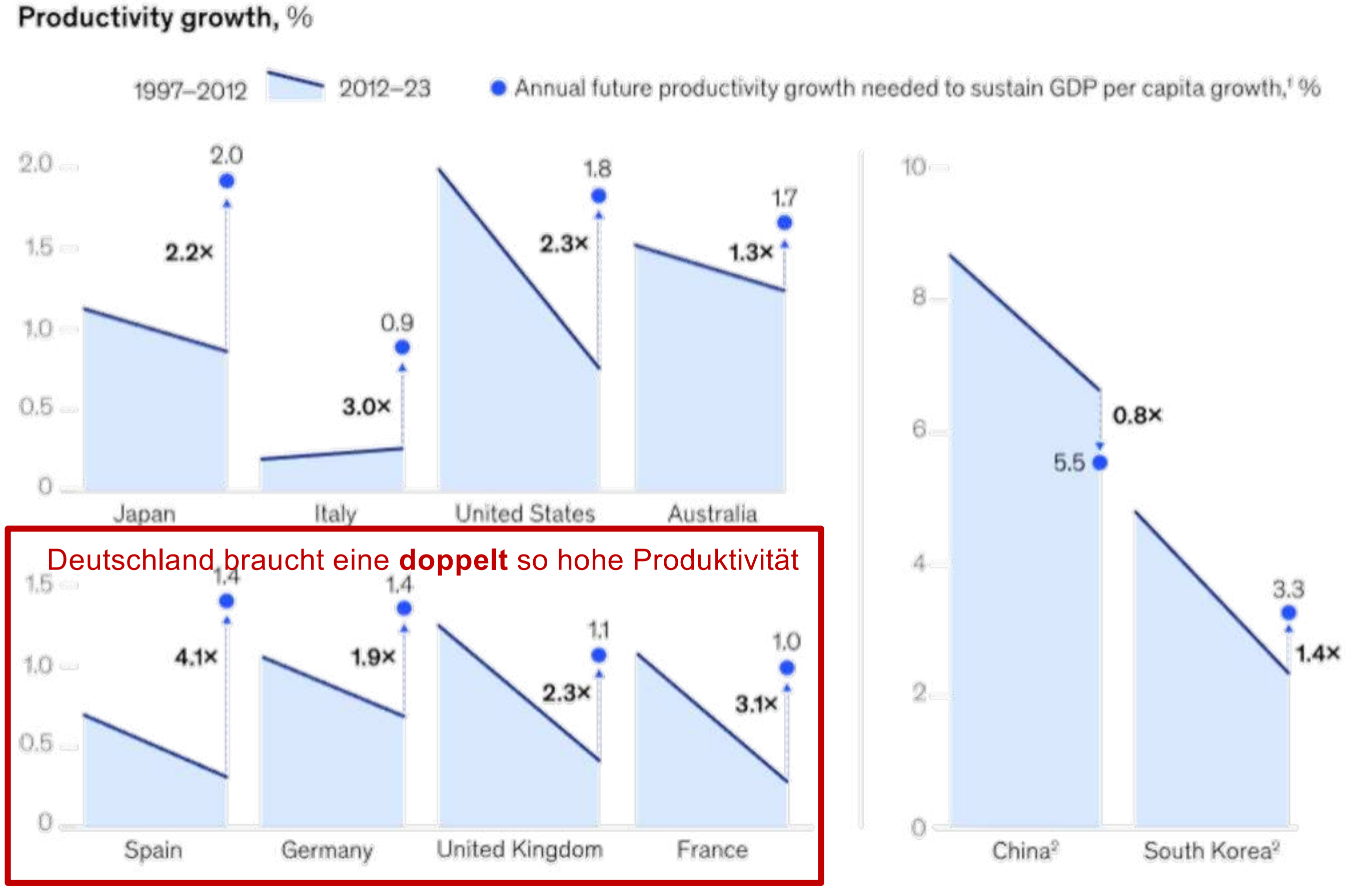
Wenn weniger Menschen arbeiten,
müssen diese Menschen
mehr
(Studen pro Woche)
und länger
(höheres Renteneintrittsalter)
arbeiten

swiss
hospitality
solutions

Das alleine reicht nicht

und ist politisch schwer umsetzbar

Um unseren Wohlstand zu wahren muss die Produktivität massiv gesteigert werden



Deutschland braucht eine **doppelt** so hohe Produktivität

¹Assuming the same hours per capita growth as 1997–2023. Calculated for first 8 countries displayed as the percentage of annual growth in productivity needed to offset the 2023–50 impact of aging (if negative) and maintain GDP per capita growth matching 1997–2023 (if positive). For China and South Korea, calculated as the productivity growth needed to achieve 4.9% and 2.2% annual GDP per capita growth, respectively. While "maintaining past GDP per capita growth" is a reasonable target for highly developed economies, China and South Korea were not as developed in 1997. Therefore, their GDP per capita growth targets are reduced, based on the trajectories followed in the past by other countries when they were at similar stages of development.
Source: World Population Prospects 2024, United Nations; ILOSTAT; The Conference Board; McKinsey Global Institute analysis

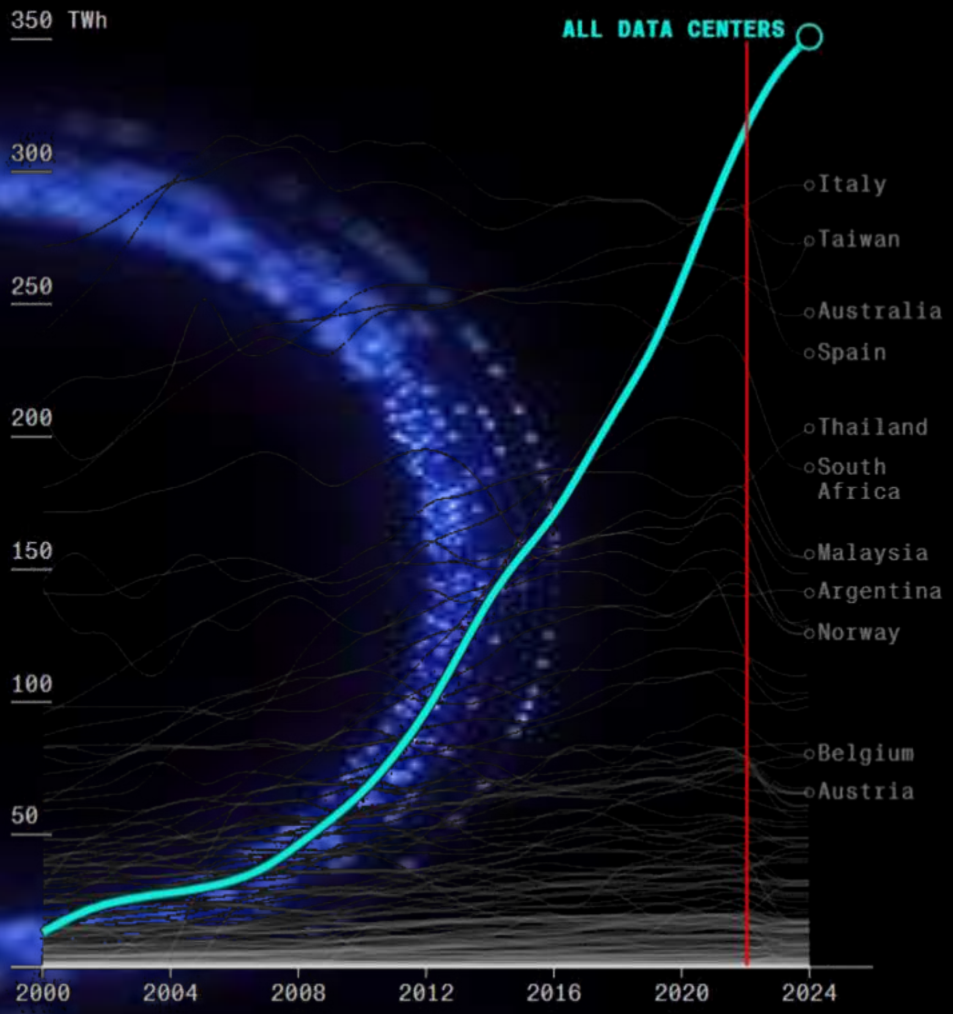
Das schaffen wir
nur mit dem Einsatz von
Technologie

swiss
hospitality
solutions

Und Technologie heisst

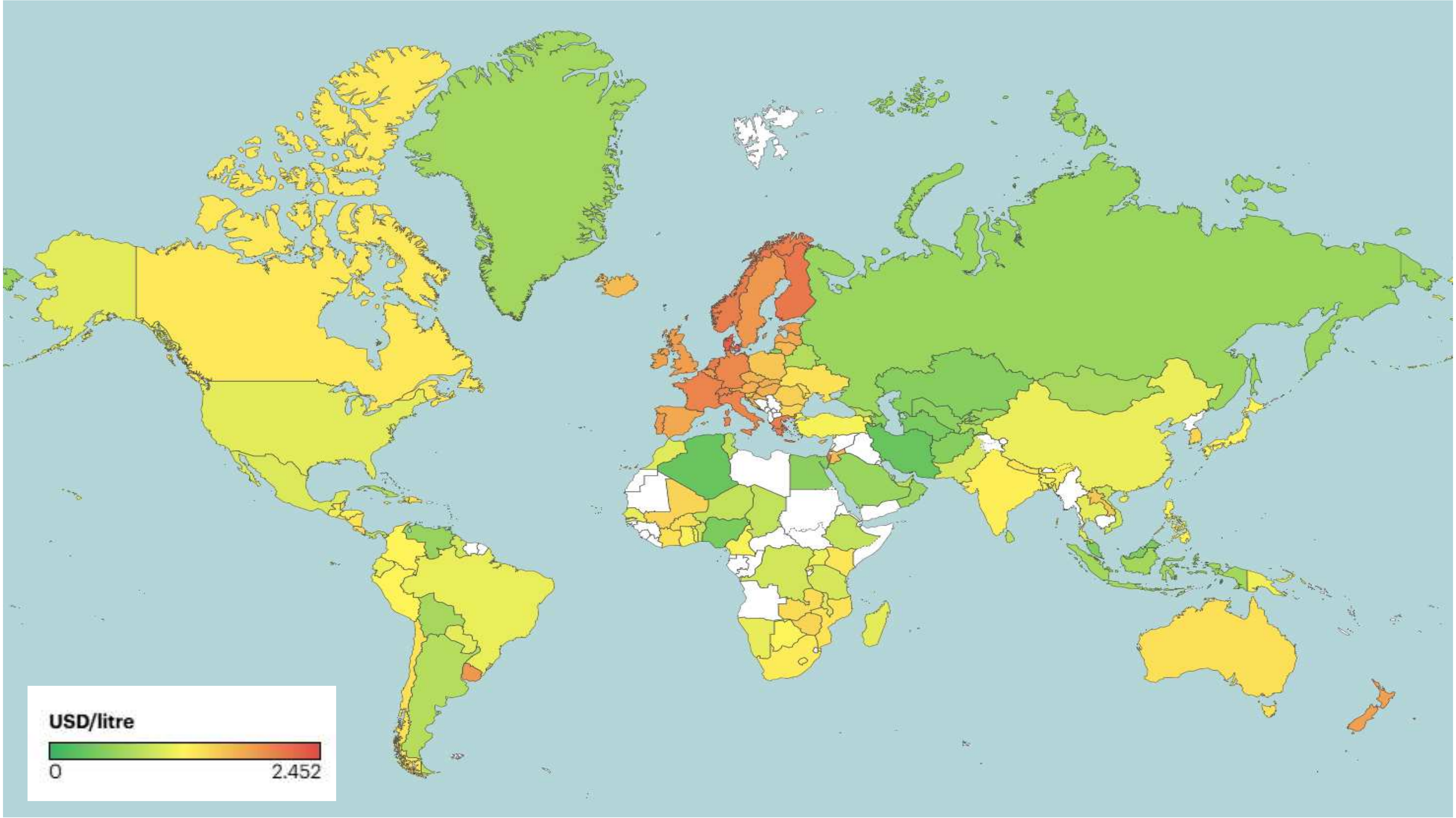
Energie

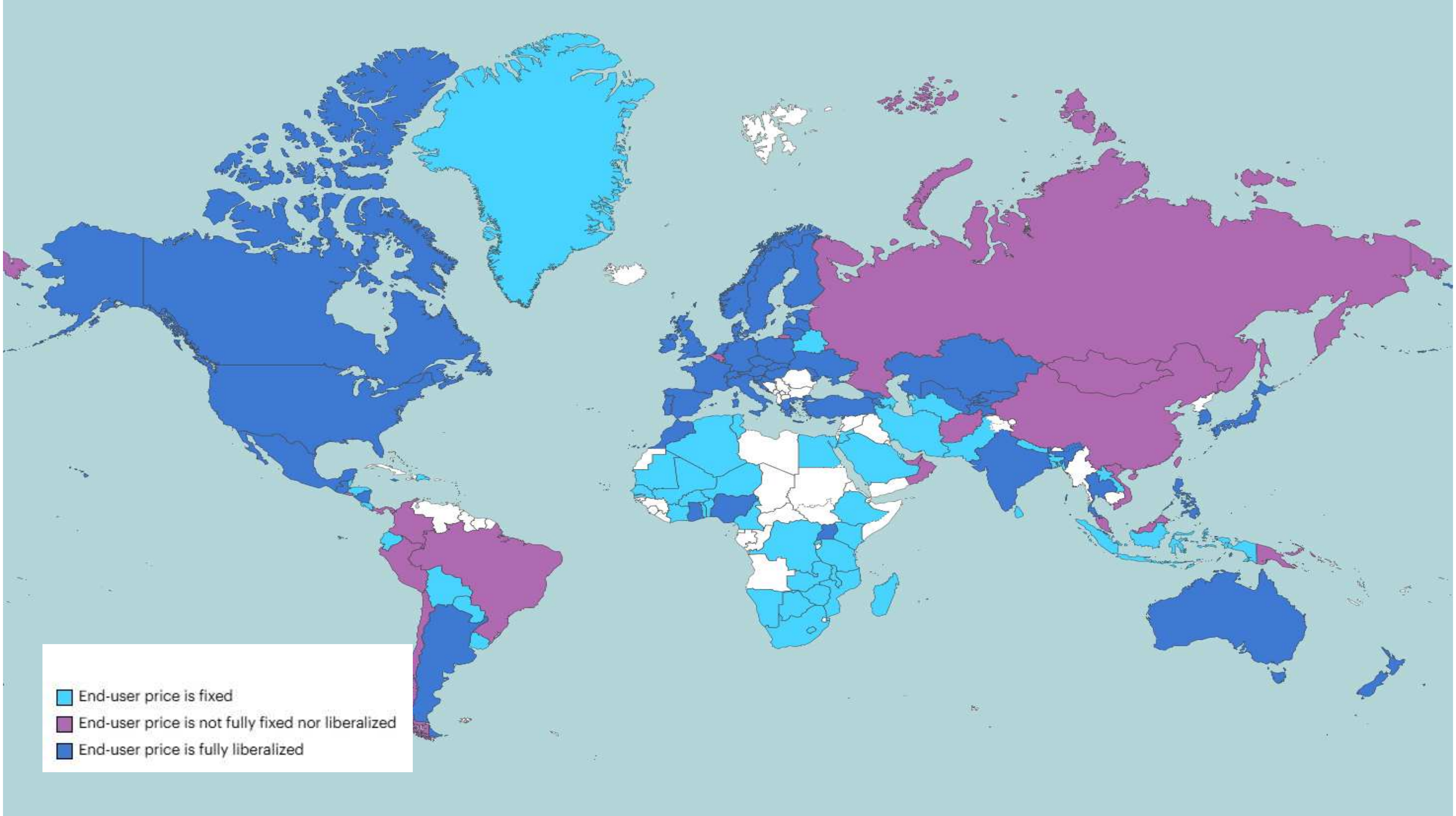
KI benötigt heute bereits mehr Energie,
als die meisten Länder.
(nur 18 Länder incl. USA und China verbrauchen mehr Energie)

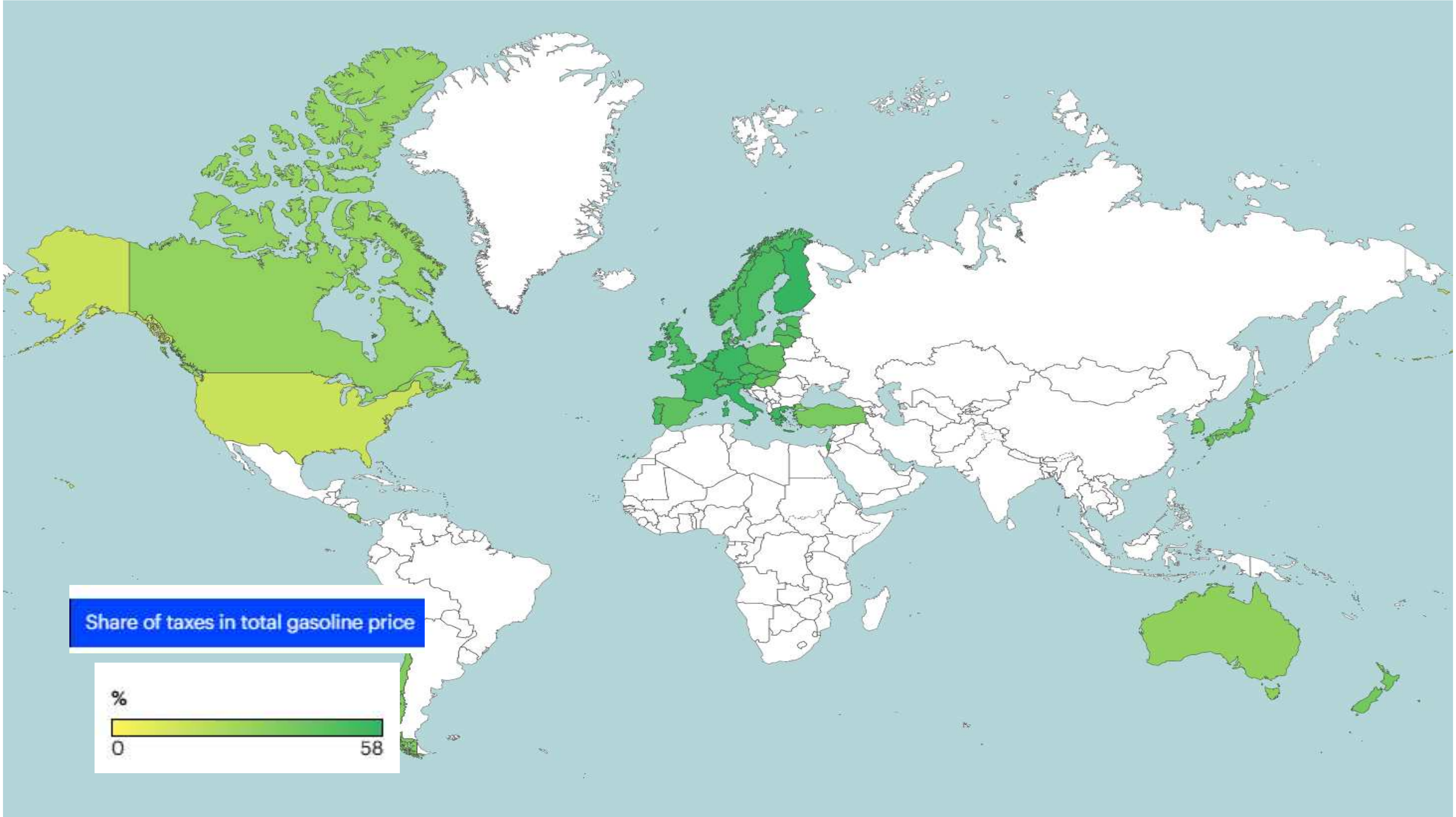


Sources: Bloomberg analysis of BloombergNEF and DC Byte data

swiss
hospitality
solutions

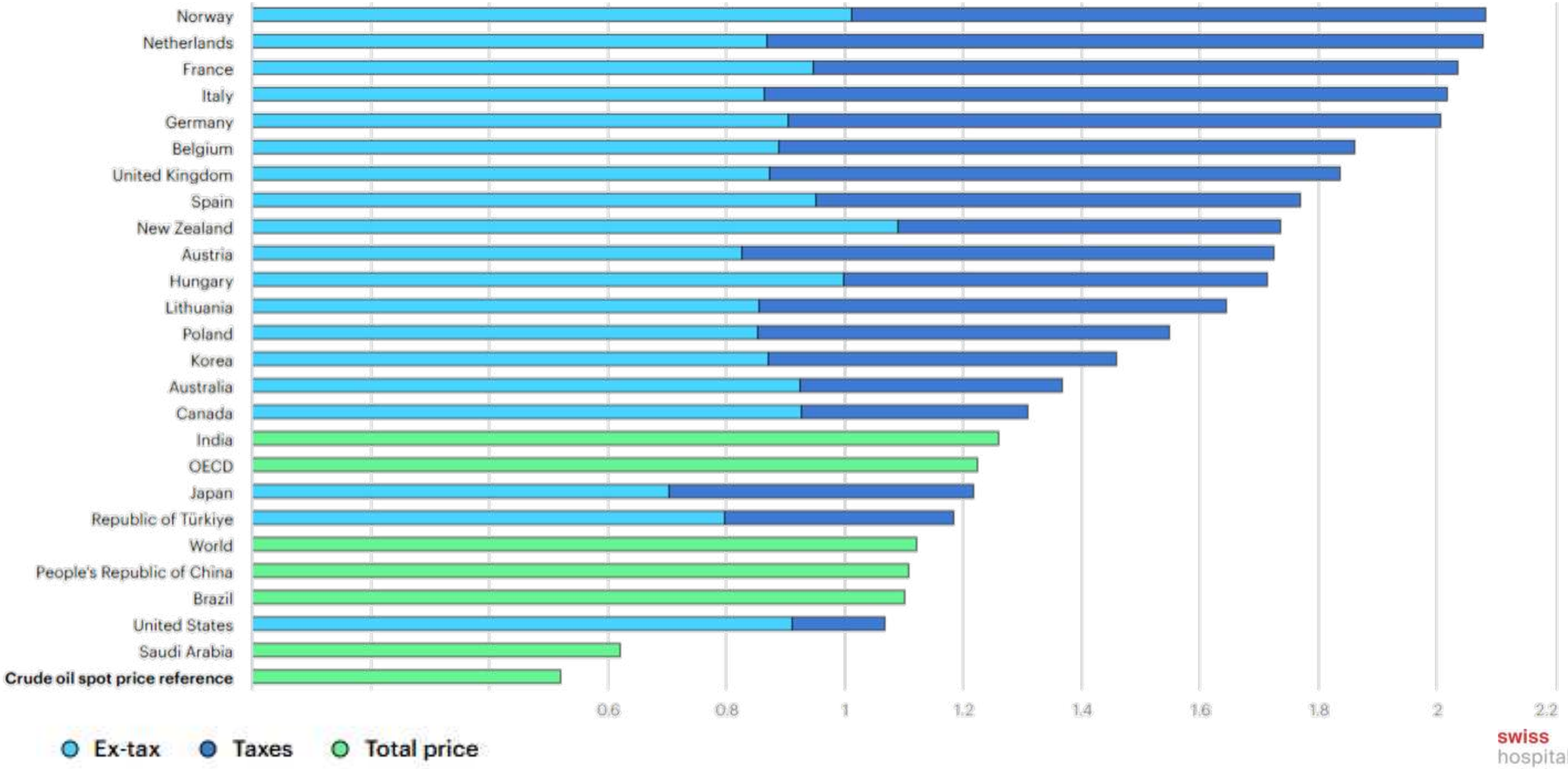

USD/litre
0
2.452


End-user price is fixed
End-user price is not fully fixed nor liberalized
End-user price is fully liberalized


Share of taxes in total gasoline price
%
0
58

Gasoline Prices & Taxes for selected countries

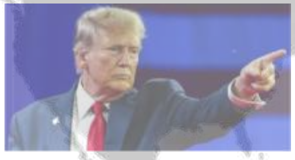
IAE 2023



swiss hospitality solutions

Politics has great influence over AI

What’s on the Geo – Political Agenda re AI?



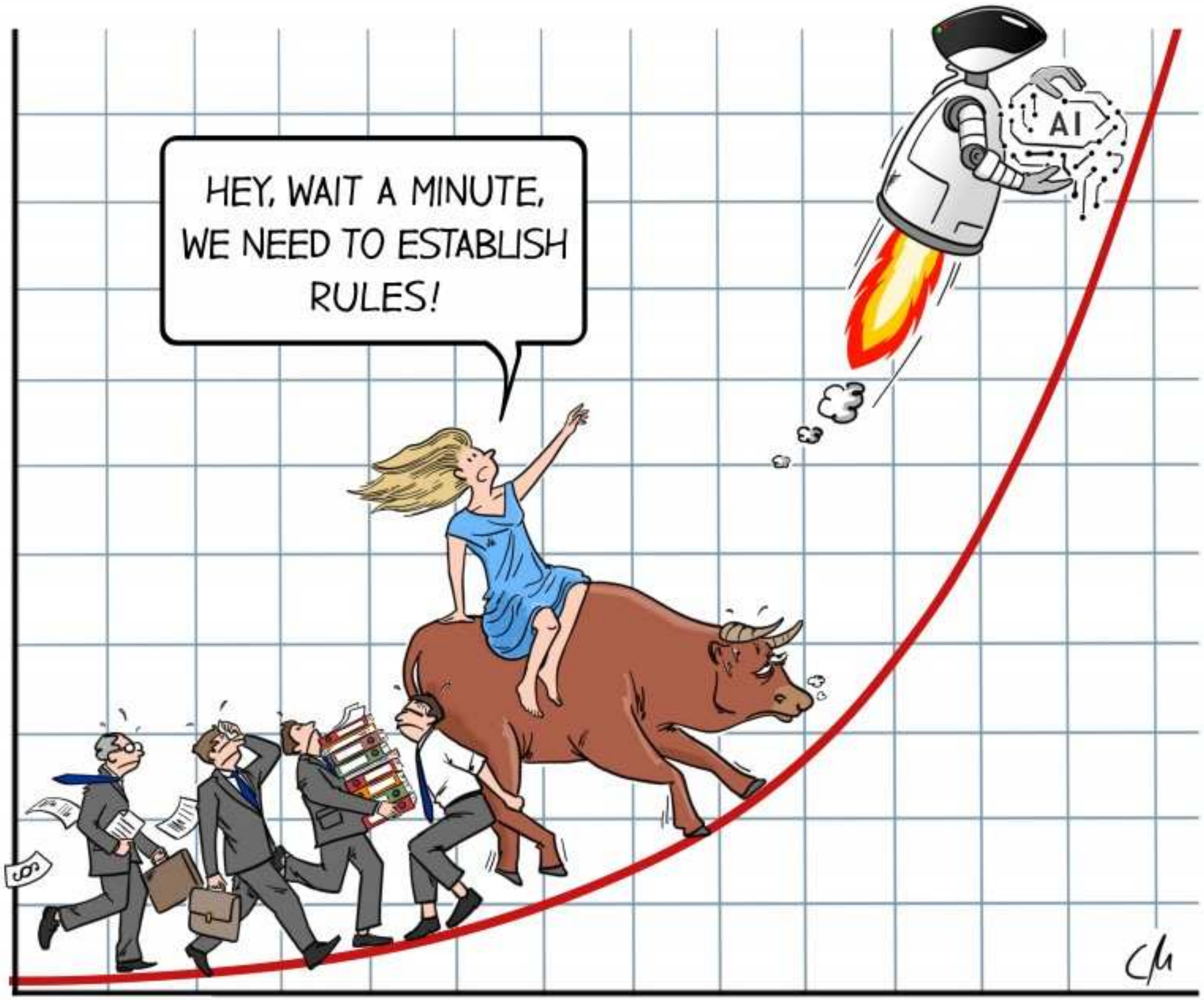
USA (Trump):
Focused on prioritizing American innovation and **competitiveness**, emphasizing deregulation and private-sector leadership while addressing national security and economic dominance.

Europe (EU Leaders):
Europe focuses on ethical AI, emphasizing human-centric, trustworthy, and sustainable technologies. The EU's strategy includes **strict regulatory frameworks** like the AI Act, promoting innovation while safeguarding privacy and rights.

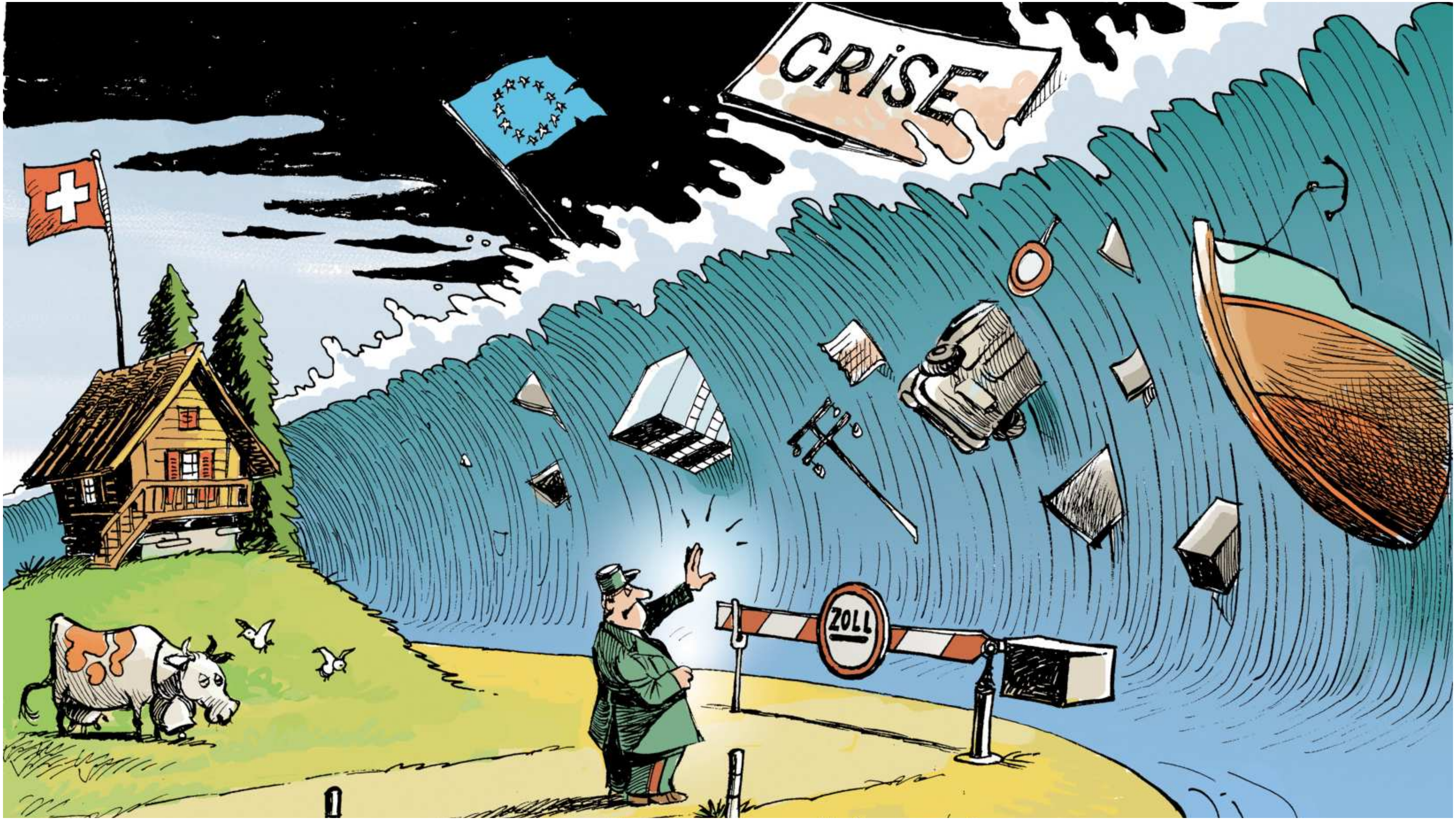
Russia (Putin): Emphasizes AI in military and cybersecurity, aiming to **enhance strategic capabilities** while fostering domestic technological development to counter Western dominance.

China (Xi): Pursues global AI leadership via **aggressive investment, data dominance**, and integration into national security and economic planning.

India (Modi): Advocates **leveraging AI for inclusive growth**, with initiatives in healthcare, education, and agriculture, balancing innovation with ethical considerations

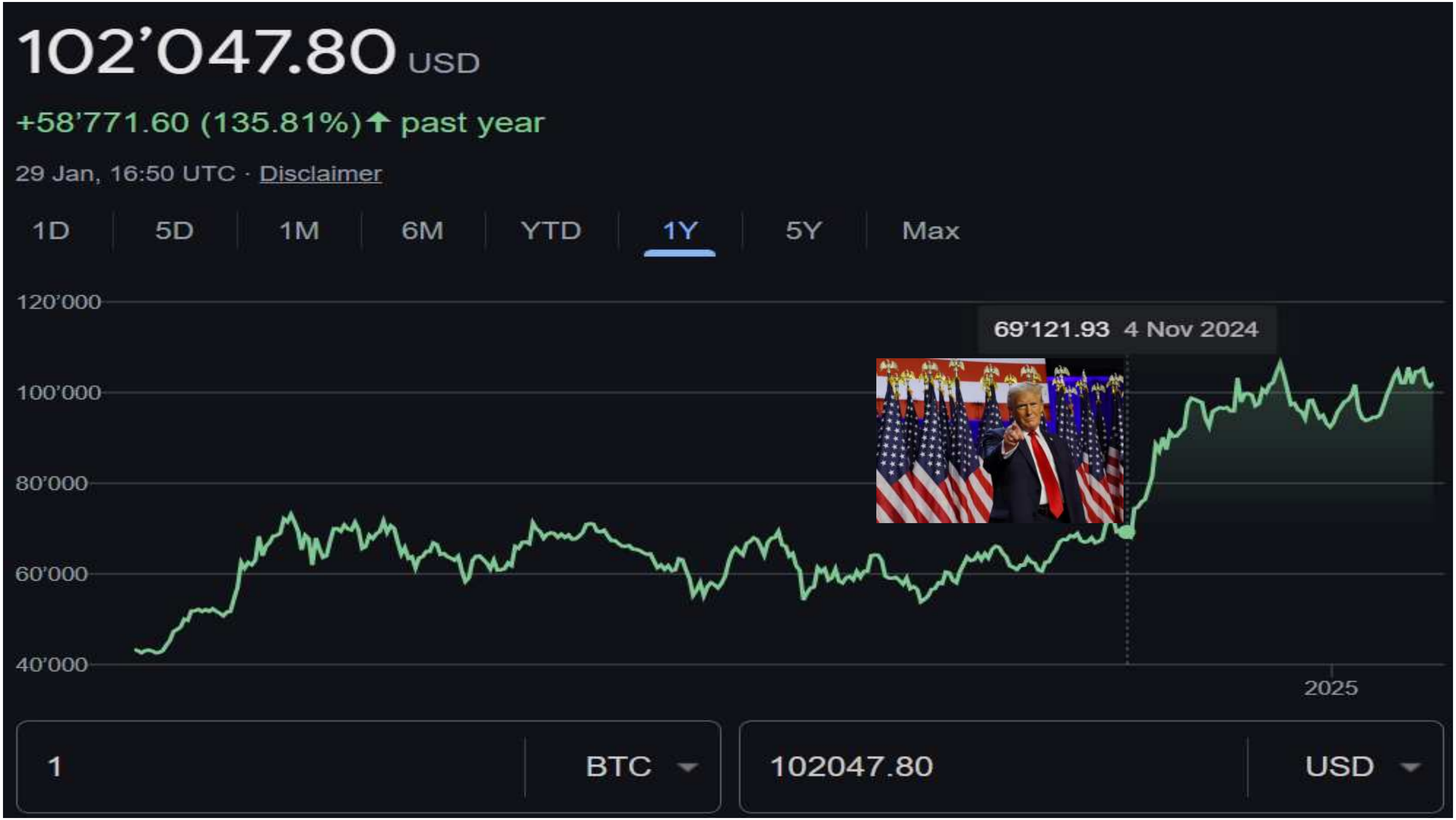

HEY, WAIT A MINUTE, WE NEED TO ESTABLISH RULES!
AI
CM

Nicht so schlimm, wir sind ja nicht in der EU


CRISE
ZOLL

Politik und Technologie –
die neue Allianz oder Mittel zum Zweck?

swiss
hospitality
solutions



102’047.80 USD

+58’771.60 (135.81%) ↑ past year

29 Jan, 16:50 UTC · Disclaimer

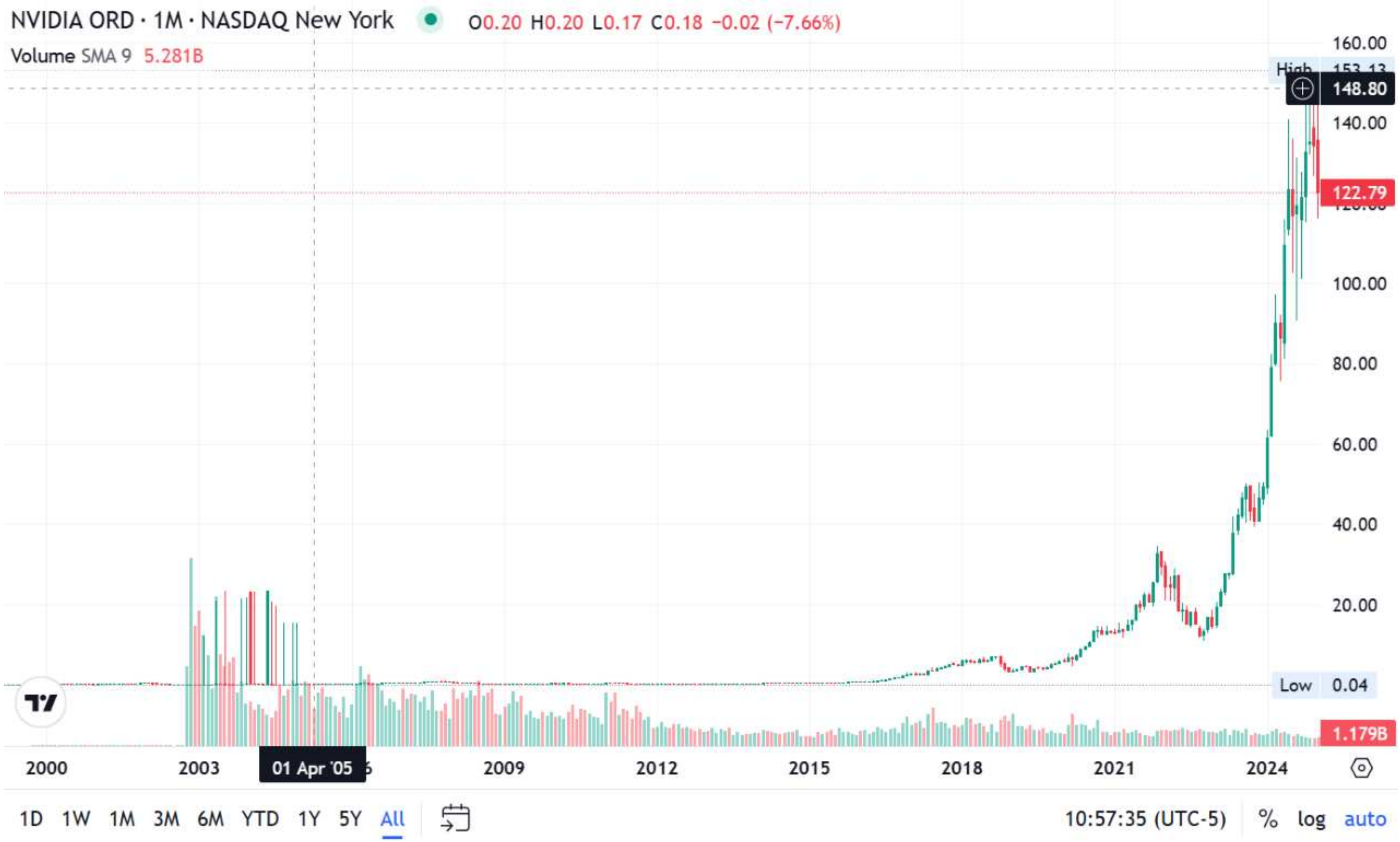
1D
5D
1M
6M
YTD
1Y
5Y
Max
120’000
100’000
80’000
60’000
40’000
69’121.93 4 Nov 2024
2025

1 BTC

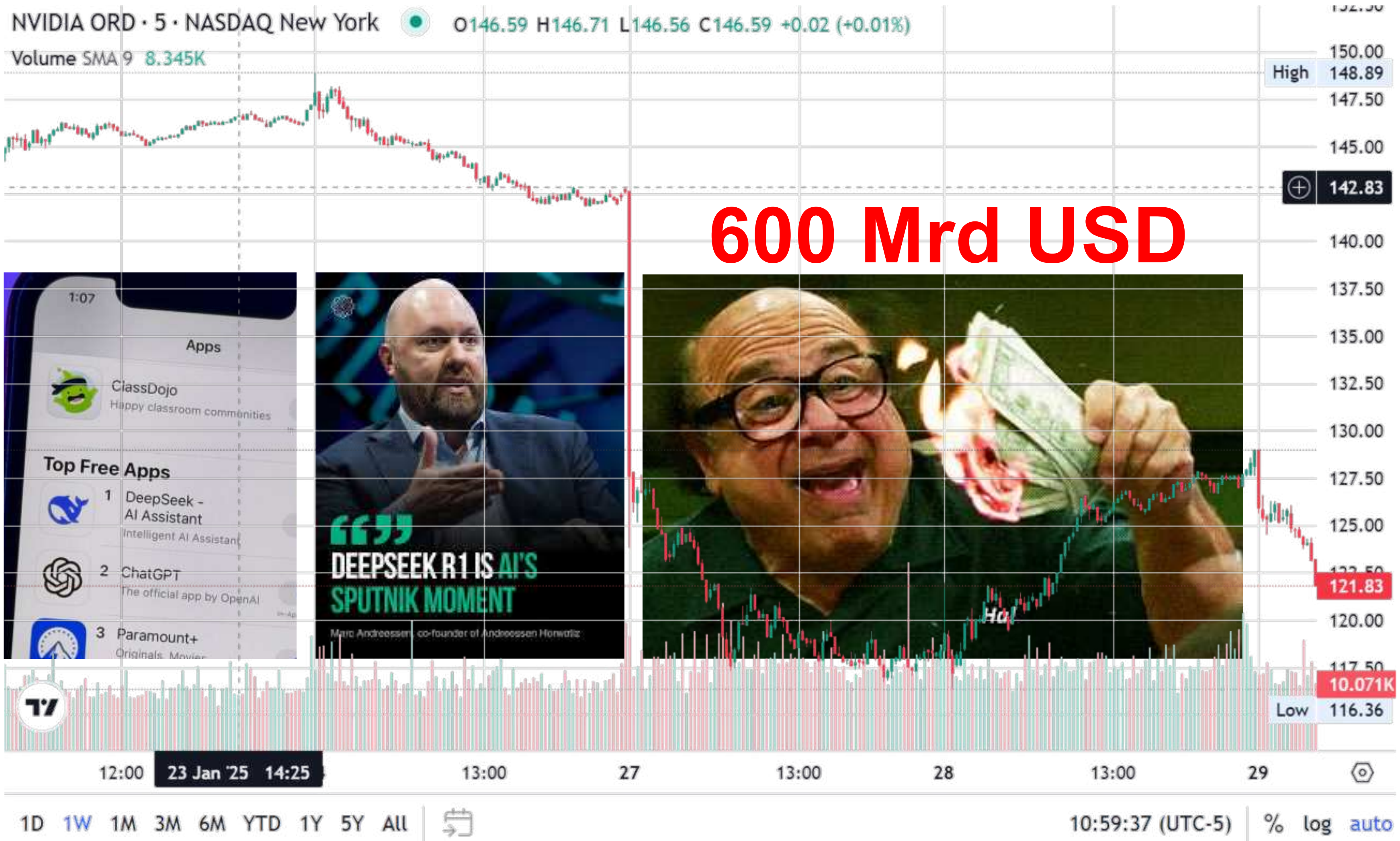
102047.80 USD

NVIDIA deepseek

Nvidia


NVIDIA ORD · 1M · NASDAQ New York
O0.20 H0.20 L0.17 C0.18 −0.02 (−7.66%)
Volume SMA 9 5.281B
160.00
High 153.13
148.80
140.00
122.79
100.00
80.00
60.00
40.00
20.00
Low 0.04
1.179B
2000
2003
01 Apr '05
2009
2012
2015
2018
2021
2024
1D 1W 1M 3M 6M YTD 1Y 5Y All
10:57:35 (UTC-5)
% log auto

Nvidia



600 Mrd USD

3 Thesen:

1) The Future of Profit muss über eine eine Steigerung der Produktivität erfolgen

2) Eine Steigerung der Produktivität bedingt den massiven Einsatz von Technologie (KI)

3) Für eine Tech-Strategie braucht es in der Zukunft sehr viel mehr Dimensionen, als bisher